



MEMORANDUM

EUGENE WATER & ELECTRIC BOARD

Rely on us.

TO: Commissioners Helgeson, Brown, Mital, Simpson and Carlson
FROM: Rene Gonzales, Customer Solutions Manager
DATE: 10/20/2017
SUBJECT: Comparison of Utility Limited Income Assistance
OBJECTIVE: Information Only

Issue

This is an information item only regarding EWEB funding levels for limited income customer program offerings compared to other regional utilities.

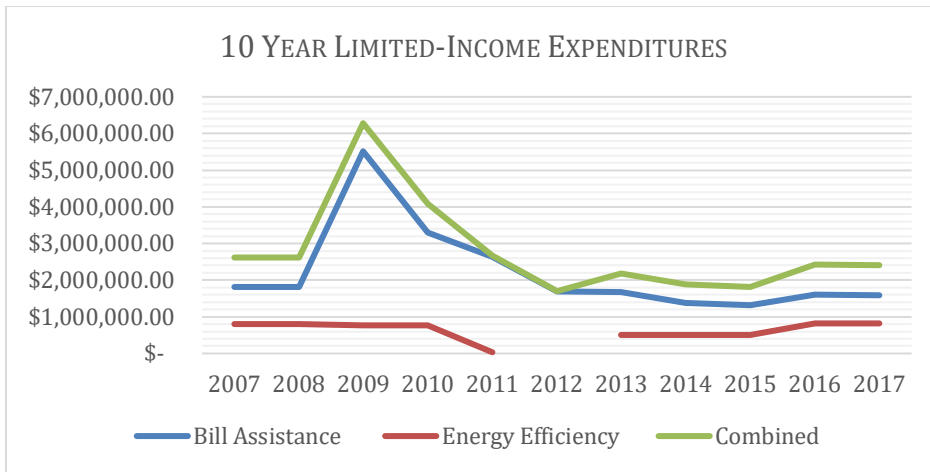
Background

At the September and October 2017 Board meetings, Commissioners received public testimony from Keith Kueny, representing the Community Action Partnership of Oregon (CAPO). He urged continuation of funding for limited income assistance and noted that while some other Northwest utilities were expanding their programs, EWEB had not. Commissioners requested additional data on EWEB and regional utilities contributions to limited-income assistance programs.

Staff requested data from a dozen area utilities, reviewed published financial reports, and PUC Oregon Utility Statistics books. We received complete information from ten of those utilities. However, direct comparisons are difficult to construct as each utility offers a different suite of programs, some voluntary and some under regulatory obligations. For example, Portland General Electric is required to collect a 1% public purpose charge for low income weatherization, and an additional required contribution for bill assistance, raising over \$20 million. In comparison, Snohomish PUD budgets \$250,000 for limited income energy efficiency programs, but has an unlimited, needs-based rate discount equivalent to \$6.5 million in 2016.

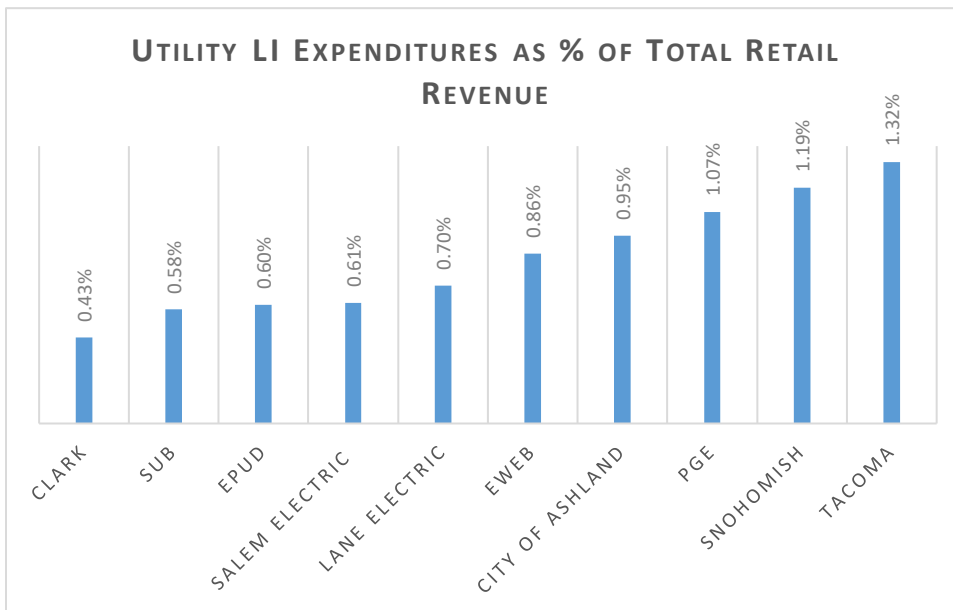
Discussion

EWEB support for limited income assistance includes bill credits and/or energy education services called Customer Care and Customer Care Plus, as well as, limited income energy assistance programs delivered through EWEB's customer solutions energy management staff and our partner agencies. Program budgets are supplemented with donations from customers, the annual Run to Stay Warm fundraiser and employee voluntary contributions. Funding levels increased dramatically during the economic recession with the addition of federal support and Board approved increases to programs. As the economy slowly recovered, grants expired and EWEB's own financial situation became more constrained, budgets for limited income assistance returned to pre-recession levels.



Note: EWEB suspended its energy-efficiency programs in 2012.

At a high level, we found that all ten utilities offer limited income energy efficiency programs, eight offer bill pay assistance, four provide rate discounts, and six offer energy education or financial literacy services. The table below shows the percentage of revenue dedicated to limited income programs in calendar year 2016 for each utility. For this comparison, 2016 actual program expenditures, not budgeted amounts, were used to calculate the percentages. For utilities with rate discounts, those contributions were treated as bill pay assistance. Two utilities did not break out energy efficiency funds for limited income customers. And because energy education programs are very difficult to compare, this data was excluded from the table. In short, this presentation is our best understanding of the data provided.



TBL Assessment

N/A

Recommendation

None at this time.

Requested Board Action

Information only